

## APPENDIX I- PLANNING GRANT APPLICATION FORM

<b>Applicant (Agency &amp; address - including zip)</b>  <div style="display: flex; justify-content: space-between;"> <div style="width: 60%;">                 Santa Cruz County                  Planning Department                  701 Ocean St., 4th Flr.                  Santa Cruz, CA 95060             </div> <div style="width: 35%; text-align: center;"> <b>Check one</b>  <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; border-bottom: 1px solid black;">City</td> <td style="width: 50%; border-bottom: 1px solid black;"></td> </tr> <tr> <td style="border-bottom: 1px solid black;">County</td> <td style="border-bottom: 1px solid black; text-align: center;">X</td> </tr> <tr> <td style="border-bottom: 1px solid black;">MPO</td> <td style="border-bottom: 1px solid black;"></td> </tr> <tr> <td style="border-bottom: 1px solid black;">COG</td> <td style="border-bottom: 1px solid black;"></td> </tr> <tr> <td style="border-bottom: 1px solid black;">RTPA</td> <td style="border-bottom: 1px solid black;"></td> </tr> <tr> <td style="border-bottom: 1px solid black;">JPA</td> <td style="border-bottom: 1px solid black;"></td> </tr> <tr> <td style="border-bottom: 1px solid black;">Joint Proposal</td> <td style="border-bottom: 1px solid black;"></td> </tr> </table> </div> </div>		City		County	X	MPO		COG		RTPA		JPA		Joint Proposal		<b>Proposed Date of Completion:</b> Dec. 31, 2013  <b>Grant Amount Requested:</b> \$ 500,000  <b>If Joint Proposal, list participating entities/ contact person:</b>	
City																	
County	X																
MPO																	
COG																	
RTPA																	
JPA																	
Joint Proposal																	
<b>Lead Applicant's Name:</b> County of Santa Cruz - Planning Department																	
<b>Title of Proposal</b> (summarize the deliverable to be funded by this grant) Santa Cruz County Sustainable Community & Transit Corridors Plan																	
<b>Applicant's Representative Authorized in Resolution</b> Name: Kathy M. Previsich Title: Planning Director Phone: (831) 454-3136 Email: PLN001 @ CO.SANTA-CRUZ.CA.US		<b>Person with Day to Day Responsibility for Plan</b> (if different from Authorized Representative) Name: Frank Barron Title: Planner III Phone: (831) 454-2530 Email: PLN782 @ CO.SANTA-CRUZ.CA.US															
Check all of the following that are incorporated or applicable to the proposal:																	
<b>Focus Area</b>		<b>Program Objectives</b>															
X	Focus Area # 1		Applying for 20% EDC set aside														
	Focus Area # 2																
	Focus Area # 3	X	Improve air and water quality														
<b>Eligibility Requirements</b> (mandatory)		X	Promote public health														
XX	Consistent with State Planning Priorities	X	Promote equity														
X	Reduces GHG emissions on a permanent basis	X	Increase affordable housing														
X	Collaboration requirement	X	Increase infill and compact development														
<b>Priority Considerations</b>		X	Revitalize urban and community centers														
X	Demonstrates collaboration & community involvement	X	Protect natural resources and agricultural lands														
X	Addresses climate change impacts	X	Reduce automobile usage and fuel consumption														
X	Serves as best practices	X	Improve infrastructure systems														
X	Leverages additional resources	X	Promote water conservation														
	Serves an economically disadvantaged community	X	Promote energy efficiency and conservation														
X	Serves a severely disadvantaged community	X	Strengthen the economy														
I certify that the information contained in this plan application, including required attachments, is complete and accurate																	
Signature: <u>Kathy M Previsich</u>		Aug. 31, 2010															
Applicant's Authorized Representative as shown in Resolution		Date															
Print Name and Title: Kathy M. Previsich, Planning Director																	

# Conceptual CONSULTANT SCOPE OF WORK for the Santa Cruz County Sustainable Community and Transit Corridors Plan (Plan) Project

## **Phase I: Existing Conditions Analysis/Vision, Issues and Opportunities**

### **Task 1: Project Initiation**

#### Task 1.1: Staff Kick-Off Meeting and Project Area Tour

The consultant team will meet with County staff at project initiation to refine the work program, schedule, and deliverables, and a County transit corridors tour/orientation.

#### Task 1.2: Final Work Program, Schedule, and Budget

Based on input received from County staff, the consultant team will make final revisions to the work program, schedule, and cost estimate.

#### Task 1.3: Refined Community Outreach Program

Based on consultation with County staff, the consultant team will refine the overall approach to community outreach, including identification of key stakeholders for participation in interviews and focus groups, approach to community workshops, and methods for communicating with the public such as a project website. Consultant team will provide bilingual Spanish translation services on a limited, as-needed basis for outreach and workshop materials, workshop presentations and facilitation.

#### Task 1.4: Project Website

The consultant team will design and utilize a web-based project portal. This portal is designed to be a central site for all relevant project information that is accessible to anyone, anywhere with an Internet connection, web browser and a username and password (allowing the project team to determine varying levels of access to information at any given time). This website will provide core tools allowing users to manage, search and share this information. Final project products, such as draft General Plan and Zoning Code amendment language, will be posted on this site for use by other local jurisdictions.

#### *Task 1 Key Deliverables*

- Staff Meeting and Project Area Tour
- Final Work Program, Schedule and Budget
- Community Outreach Program
- Project Website

### **Task 2: Existing Conditions, Vision and Opportunities**

#### Task 2.1: Review Background Materials

The consultant team will review base data and relevant planning documents supplied by the County and collaborators, such as the General Plan, Redevelopment Agency plans, the Housing Element, bus system transit plans, regional transportation plans, and other background data (as available) and other projects underway related to the project area. Consultant will meet and work with the Santa Cruz County Regional Transportation Commission (SCCRTC) and Santa Cruz Metropolitan Transit District (Metro Transit) staff to get up to speed on their relevant planning efforts. The County will provide available aerial photographs and digital maps of the area that show zoning, land use, ownership, housing, infrastructure, traffic patterns, and community facilities, which will be reviewed by the consultant team and utilized in Task 2.5.

## **Santa Cruz County Sustainable Community and Transit Corridors Plan Conceptual Consultant Scope of Work**

### **Task 2.2: Existing Conditions Site Analysis**

Using the information provided by the County and the initial site tour(s), the consultant team will develop a site analysis of the existing conditions of the project area and the immediate surrounding context. This will include the built environment and open space, land use, basic circulation patterns, and infrastructure. The site analysis will also include developing a strong understanding of urban design and form in the area, including building heights, massing, scale, setbacks, parking requirements, historic character, and current building standards and design guidelines.

### **Task 2.3: Stakeholder Interviews/Focus Groups**

The consultant team will conduct up to six one-hour stakeholder interviews/focus groups. These interviews will allow for small-group and one-on-one interviews with stakeholders identified by County staff and the consultant team. Potential interviewees include community leaders, elected officials, property and business owners, relevant County and city staff, and others as needed.

### **Task 2.4: Steering Committee Meeting #1**

The project Steering Committee, will consist of AMBAG, SCCRTC, Metro Transit, each of the four cities, Cabrillo College, and private sector businesses and/or institutions. It will be an advisory body to the County, providing overall policy direction for the plan. During the initial meeting, the consultant will introduce the project, process, and key milestones. The consultant will educate the Steering Committee on the technical aspects of the plan and implementation measures and will facilitate a dialogue to identify the key components and possible hurdles for a successful Sustainable Community and Transit Corridors Plan, including understanding each member's deemed outcomes for the plan and process.

### **Task 2.5: Existing Conditions Base Mapping**

Based on a review of background materials and the site analysis, the consultant team will create a portfolio of existing conditions maps of the Soquel Drive Corridor Focus Area and its surrounding context. Less detailed mapping will also be done for the other County transit corridor areas. These maps will serve as the basis for developing concept alternatives and diagrams.

### **Task 2.6: Circulation and Parking Assessment**

Consultant (or traffic/transit sub-consultant) will collect available data for use in the analysis of existing conditions, which will help identify the key transportation-related constraints, particularly in the Soquel Drive Corridor Focus Study Area. Data requirements for the study area are listed below.

- Existing and planned roadway geometrics and traffic controls (Soquel Drive Corridor only)
- Existing and planned transit service, ridership, and facility descriptions
- Location of existing and planned bicycle and pedestrian facilities and available collision information

The collection of existing data will include a site visit at each location to gain qualitative information about the relative levels of bicycling and walking as well as automobile queuing. County Department of Public Works, Caltrans and SCCRTC will provide traffic counts along main transit corridor roadway segments, and State Highway 1 mainline and ramp segments, and Metro Transit will provide existing and future bus ridership data/projections. For the existing conditions analysis, consultant (or traffic/transit sub-consultant) will document intersection and roadway operations analyzed as part of previous studies (in Soquel Drive Focus Area only). In



## **Santa Cruz County Sustainable Community and Transit Corridors Plan Conceptual Consultant Scope of Work**

addition to the Soquel Drive Corridor, consultant (or traffic/transit sub-consultant) will document existing conditions and opportunities related to transit service, bicycle facilities, and pedestrian facilities along other transit corridors in the study area. Gaps in each system will be noted.

Consultant (or traffic/transit sub-consultant) will also review current on- and off-street parking demand within the Soquel Drive Corridor Focus Area, and will conduct parking occupancy counts to estimate area parking utilization. Based on the results of the parking surveys, the team will note any shortfalls or surpluses in the Soquel Drive Corridor Focus Study Area.

Using this data, the consultant (or traffic/transit sub-consultant) will develop a baseline understanding of current parking conditions in the Soquel Drive Corridor Focus Area. Where appropriate, the consultant team will evaluate the potential for shared parking among complementary uses by applying the methodology in ULI's *Shared Parking Manual*. This analysis will show the extent to which parking requirements can be reduced due to complementary land uses having different peak parking characteristics. If appropriate, consultant (or traffic/transit sub-consultant) will also provide recommendations regarding the boundaries and amount of an in-lieu parking fee or establishment of a parking benefits district.

### **Task 2.7: Infrastructure Analysis**

Consultant (or civil engineering sub-consultant) will identify and evaluate the status of existing public infrastructure in the study areas, with more focused attention on the Soquel Drive Corridor Focus Area. This work effort will include reviewing existing reports and documents and interviews with staff from the various divisions of the County Public Works Department to develop a complete picture of the existing infrastructure in place within the overall study area and focus area. Field visits may be undertaken to gather additional data on an as-needed basis.

For Soquel Drive Corridor Focus Area, Consultant (or civil engineering sub-consultant) will evaluate condition of the existing street pavement, sidewalks, curbs and gutters; evaluate driveway and curb ramps to determine compliance with ADA requirements; evaluate conditions of visible, existing utilities and other public infrastructure; and verify locations of critical utility and infrastructure elements. Consultant (or civil engineering sub-consultant) will also gather information on existing utility facilities as needed and as available by collecting as-builts and system maps for the various utilities within the Soquel Drive Corridor from the County and from PG&E. Consultant (or civil engineering sub-consultant) will collect as-builts on the various streets, sidewalks and right of ways, as available from the County, which will be used to determine the feasibility of potential needed improvements. Consultant (or civil engineering sub-consultant) will collect copies of relevant reports, studies, and plans from the County related to past utility and infrastructure development in the Soquel Drive Corridor Focus Area.

After initial information gathering, Consultant (or civil engineering sub-consultant) will evaluate the state of the existing infrastructure and utility systems in the Soquel Drive Corridor Focus Area and analyze them for constraints, deficiencies, quality, and effectiveness. Consultant (or civil engineering sub-consultant) will primarily focus on the public works infrastructure and utility systems such as streets, sidewalks, water, wastewater, storm drainage, and flood control. Consultant (or civil engineering sub-consultant) will include information for electrical systems, communications infrastructure, and other non-County owned systems to the degree it is available and relevant to the Soquel Drive Corridor Focus Study Area.

In addition to identifying and evaluating the condition of existing infrastructure in place, in the Soquel Drive Corridor Focus Area (only), Consultant (or civil engineering sub-consultant) will identify potential environmental concerns or constraints to infrastructure expansion and/or

## **Santa Cruz County Sustainable Community and Transit Corridors Plan Conceptual Consultant Scope of Work**

improvement in the focus study area, and to a extent the entire study area. Consultant (or environmental planning sub-consultant) will provide consultation and assistance with identification of environmental constraints in the Soquel Drive Corridor Focus Area (only) if this should become necessary.

The Plan will also include a Climate Change Impacts Analysis and Adaptation component. For this section of the Plan, Consultant (or civil engineering sub-consultant) will address the types of mitigations that the County should consider in the long term to address climatic impacts and adaptations that could affect the County's economy and transit corridor areas, including sea level rise (including inundation, coastal erosion and aquifer impacts). This analysis will consist primarily of a consolidation and reiteration of research and planning work already completed by local, regional and state resource agencies and research institutions.

A report summarizing the analysis of existing infrastructure and potential environmental constraints in the study area, with special emphasis on the Soquel Drive Corridor Focus Area, and the Climate Change Impacts Analysis and Adaptation analysis, will be developed and provided for the study team's use as it develops the overall Sustainable Community and Transit Corridors Plan.

### **Task 2.8: Economic Development & Market Demand Analysis**

Consultant (or economic analysis sub-consultant) will evaluate existing economic and demographic trends likely to affect economic development (esp. creation of "living-wage" jobs) and the real estate market within the entire study area, with a focus on sites in or near transit corridor locations. The market analysis will study key County economic sectors, and will include an assessment of the types of jobs that can and should be pursued. The analysis will focus on job growth by industry and types of business (e.g., headquarters, back office, start-ups, etc.), as well as commute patterns. The amount and types of land needed to accommodate these future jobs will be assessed, along with an assessment of projected demand for various housing types to house the projected workforce. The demographic analysis will include information on growth trends, age distributions, and household size, income, and tenure.

This economic assessment component will evaluate the resources and conditions required to make improvements that preserve existing jobs and expand hiring and other growth of private sector employment throughout the study area. The quantities, location, amount and types of land needed to accommodate these future jobs will be assessed. The focus will be on potential infill sites along existing or potential future transit corridors.

The primary goal of this task will be to ensure that economic development and revitalization efforts focus on job creation and product types that are realistic and achievable. This task will also consider the level of market support for residential, office, and retail uses in the transit corridor areas, indicating which market uses offer the strongest potential to support a revitalization process.

This task will also include a detailed examination of the medical uses that have become concentrated along Soquel Drive, and planning for the anticipated amount, type and general locations of medical facilities that will be needed to serve the Santa Cruz community in the future.

### **Task 2.9: Steering Committee Meeting #2**

The purpose of this meeting is to discuss project area's assets, issues and opportunities with the Committee, seeking the group's feedback and direction in potential revisions and/or

## **Santa Cruz County Sustainable Community and Transit Corridors Plan Conceptual Consultant Scope of Work**

refinements to the consultant team's preliminary existing conditions analysis. We will also discuss the Community Workshop #1 format and approach with the Committee.

### **Task 2.10: Existing Conditions Report**

The consultant team will prepare a comprehensive technical report surveying the existing conditions analysis and providing an overview of issues, opportunities and challenges derived from stakeholders and the community. The results of the site analysis, circulation assessment and economic development/market demand analysis will be incorporated into this report. Containing narrative, mapping, and tabular data, this report will present an overall understanding of land use, design, transportation/circulation, housing, and economic issues and opportunities specific to the transit corridor areas of the unincorporated County, with particular emphasis on the Soquel Drive Corridor Focus Area.

#### **Task 2 Key Deliverables**

- Existing Conditions Site Analysis
- Circulation and Parking Assessment
- Infrastructure Analysis
- Market Demand/Economic Development Analysis
- Stakeholder Interviews/Focus Groups Summary Memo
- Portfolio of Base Maps
- Existing Conditions Report
- Steering Committee Meetings #1 and #2 Summary

### **Task 3: Overall Vision, Goals and Policies**

#### **Task 3.1: Community Workshop #1: Vision, Issues & Opportunities**

The first Community Workshop will be an interactive and exciting public introduction to the planning process. This session will focus on community identification of:

- Area-wide assets, issues, and opportunities
- A guiding vision for future development and overall revitalization of transit corridors in the unincorporated area
- Potential urban design opportunities for transit corridors and surrounding neighborhood connections
- Key land use areas/opportunities for improvement
- Key elements that reflect the desired local values, history and culture and could represent the unique identity of the community

This workshop will be held at a central location in order to be most accessible to participants. The workshop will include a PowerPoint presentation reviewing existing conditions prepared earlier in Task 2.2. Following the presentation, the consultant team will lead community participants in a discussion of issues, opportunities and visions related to the project area, especially in relation to land use, transportation/circulation, economics, and community design. The consultant will provide one facilitator and one graphic recorder to document the discussion for the workshop. The consultant will also prepare and provide workshop materials that include base maps, poster displays, agendas, comment cards, sign-in sheets, and nametags.

The consultant team will combine and synthesize feedback and comments from this Community Workshop, the first developer roundtable (see Task 3.2 below), and interaction with County staff and other stakeholders to develop a Vision, Goals and Policies Report and Framework.

**Santa Cruz County Sustainable Community and Transit Corridors Plan  
Conceptual Consultant Scope of Work**

**Task 3.2: Developer Roundtable #1**

In consultation with County staff, the consultant team will convene a roundtable of area developers to “ground truth” the economic development/market analysis and round out our understanding of the issues and opportunities related to development in the project area. This session will be conducted with 5-10 area developers, brokers and real estate professionals and will focus on identifying potential development opportunities; criteria to attract developers; barriers to development projects; and regulatory processes that help or hinder new development.

**Task 3.3: Vision, Goals & Policies Report and Framework**

The consultant team will utilize the analysis from Task 2 and the input from Task 3 to work with County staff to develop a preliminary vision statement, set of goals and overall organizational planning framework for improvements/revitalization.

**Task 3.4: Steering Committee Meeting #3**

The purpose of this meeting will be to review and discuss the outcomes of Community Workshop #1 and the results of the Developer Roundtable. In addition, the consultant will review the emerging Vision, Goals and Policies Framework, seeking the group’s feedback and direction in potential revisions and/or refinements. At this meeting, the consultant will also present the format for Workshop #2.

**Task 3 Key Deliverables**

- Community Workshop #1 Prep, Materials, Facilitation, Recording
- Developer Roundtable #1
- Vision, Goals & Policies Report and Framework
- Steering Committee Meeting #3 Summary

**Phase II: Plan Concepts and Strategies**

**Task 4: Initial Plan Concepts and Strategies**

**Task 4.1: Community Workshop #2 – Design Charettes**

The second Community Workshop will focus on confirming the overarching planning principles as well as preliminary design concepts and strategies for achieving the community’s vision for the County’s transit corridors. The workshop will include a “virtual tour” of the Soquel Drive Corridor Focus Area to familiarize participants with that corridor’s assets, constraints and opportunities as identified and defined in Tasks 2 and 3. This will help ensure that all participants share a common vocabulary in discussing the area’s future improvement and revitalization. To facilitate the tour, consultant will provide all workshop attendees with a tour packet, including an aerial photo and selected base maps. During the tour, participants will be encouraged to take notes and make comments on the maps to pinpoint their ideas and concerns.

Based on the virtual tour, the workshop participants will break into smaller groups to engage in a design charrette to explore design ideas for one or more selected locations along the Soquel Drive Corridor Focus Area (with ideas potentially transferable to other transit corridors). After the charrette, small groups will be invited to share their concepts with the larger group for discussion and selection of preferred concepts and strategies.

## **Santa Cruz County Sustainable Community and Transit Corridors Plan Conceptual Consultant Scope of Work**

### **Task 4.2: Development of Plan Concepts and Strategies**

Utilizing the existing conditions data and the results of Community Workshop #2, the consultant team will develop a range of plan concepts and strategies (including implementation strategies), with a focus on the Soquel Drive Corridor, for development and testing. Possible implementation strategies for County action might include a transit-supportive mixed-use zoning district or combining district overlay. These concepts will incorporate and address the following areas:

- Streetscape and Signage
- Transportation & Parking
- Housing
- Commerce & Retail
- Urban Design and Character
- Catalytic Project Opportunities
- Infrastructure

### **Task 4.3: Steering Committee Meeting #4**

The purpose of this meeting is to review emerging plan concepts and strategies that the consultant team developed based on the results of Community Workshop #2, seeking the group's feedback and direction in potential revisions and/or refinements.

### **Task 4.4: Preliminary Land Use Plan/Strategy**

Building on feedback from Staff and the Steering Committee, the consultant team will develop a preliminary Soquel Drive Corridor land use plan and strategy diagram with accompanying narrative explanation that shows how proposed improvement concepts will protect and enhance the streetscape and public open spaces; improve traffic circulation and parking; create strong pedestrian connections; and create mixed-use development that is efficient, safe, attractive and feasible from a market perspective. This preliminary plan will identify areas of stability and areas of change, as well as specific catalytic opportunity sites. These concepts would be transferable to transit corridors in the rest of the unincorporated area, as well as other local jurisdictions throughout the state.

### **Task 4.5: Multi-Modal Transportation Needs Assessment for Soquel Drive Corridor Focus Area**

Consultant (or traffic/transit sub-consultant) will evaluate the draft land use plan/strategy for the Soquel Drive Corridor Focus Area to estimate the relative traffic intensity and the effectiveness of mixed-use components as compared with the County's General Plan land use designations and goals. This analysis will be based on "4D's" factors, (density, diversity of land use, urban design factors, and access to regional destinations) which can be used to evaluate the relationship between travel and urban form. This analysis will include rough order of magnitude trip generation estimates for the proposed land use changes that will be included as part of the plan for the Focus Area.

Using the existing conditions analysis described in Phase I and the trip generation estimates above, the consultant (or traffic/transit sub-consultant) will conduct a planning-level analysis of key roadway segments that would serve as regional links into and out of the Focus Area. This analysis will estimate the number of lanes required on the area's major transportation facilities, changes to transit service that may be needed to serve the increase in demand, and improvements to the local bicycle and pedestrian networks. This analysis is intended to provide an estimate of the infrastructure requirements of different development densities along the Soquel Drive Corridor, as well as the effects of network changes such as lane reductions.



## **Santa Cruz County Sustainable Community and Transit Corridors Plan Conceptual Consultant Scope of Work**

The deliverable for this task is a preliminary draft set of transportation solutions for the Soquel Drive Corridor Focus Area that would be integrated with the overall Plan.

### **Task 4.6: Infrastructure Assessment for Soquel Drive Corridor Focus Area**

Consultant (or civil engineering sub-consultant) will work with the study team as they develop the vision and the possibilities for the future of the Soquel Drive Corridor Focus Area.

Consultant (or civil engineering sub-consultant) will evaluate the adequacy of the existing infrastructure systems to support the projected transit supportive development along Soquel Drive. Consultant (or civil engineering sub-consultant) will develop infrastructure improvement trajectories for the various utility systems and the public street system in the Soquel Drive Corridor Focus Area to correspond to potential future transit supportive growth and development there. Consultant (or civil engineering sub-consultant) will work with the County Public Works and Planning staff to assure these are realistic and achievable. Where significant changes might be necessary to accomplish the new vision, consultant will propose solutions and work with County Public Works and Planning staff to refine these ideas or approaches. Consultant (or civil engineering sub-consultant) will develop order of magnitude cost estimates for these various utility and infrastructure system upgrades or changes.

Consultant (or civil engineering sub-consultant) will develop planning concepts, potential streetscape improvements, and other capital improvement projects that might be proposed for the Soquel Drive Corridor, by evaluating the engineering aspects of the proposed concepts or improvements, identifying potential engineering constraints, and completing order of magnitude cost estimates for the engineered portions of the improvements. The deliverable for this task is a preliminary draft Infrastructure Assessment for the Soquel Drive Corridor Focus Area that would be integrated with the overall Plan.

#### **Task 4 Key Deliverables**

- Community Workshop #2 Prep, Materials, Facilitation, Recording
- Preliminary Soquel Drive Corridor Land Use Plan/Strategy Diagram
- Draft Set of Transportation Solutions for Soquel Drive Corridor Focus Area
- Draft Infrastructure Assessment for Soquel Drive Corridor Focus Area
- Steering Committee Meeting #4 Summary

### **Task 5: Preferred Plan Concept**

#### **Task 5.1: Board of Supervisors/Planning Commission Check In**

The consultant team will facilitate presentations and discussions with the Planning Commission and the Board of Supervisors to review the Preliminary Land Use Plan/Strategy. This joint session will focus on selecting a preferred direction for the concepts/strategies and prioritizing key improvements. The greater community will be invited to this session to augment the overall public participation process and provide additional opportunities for input and comment. The consultant team will provide all appropriate posters, materials and PowerPoint presentation to help facilitate the discussion and build consensus on key directions.

#### **Task 5.2: Preferred Plan Concept and Catalytic Opportunity Sites**

Based on Board of Supervisors and Planning Commission review, the consultant team will refine the land use plan and strategy diagram(s) for the Soquel Drive Corridor Focus Area. In addition, the consultant team will begin working on preliminary “form + character”-based design guidelines for the public and private realm. The guidelines will build upon existing documents, but will also reflect the input received from the community, County staff, Board/Commission members, and developers.

## **Santa Cruz County Sustainable Community and Transit Corridors Plan Conceptual Consultant Scope of Work**

The confirmation and refinement of catalytic opportunity sites, including the development of site programs, site design, visuals and pro forma analysis, will be key to this task. Consultant team will provide site design and illustrative representation, including 3-D analysis, photo-simulation and sketches. Consultant team (or economic analysis sub-consultant) will evaluate the development economics (with a focus on job creation) of catalytic opportunity sites identified as part of the study process. The financial feasibility analysis will employ “static” pro forma models that compare development costs to the future resale value of buildings after stabilized operations have been achieved. For each of the catalytic sites, cost and revenue estimates and land costs will vary according to the specific site attributes and context. The information will be derived from the market findings above as well as from the Developer Round Table session #1, interviews with developers of similar prototypes within the region, and in-house data.

### **Task 5.3: Steering Committee Meeting #5**

The purpose of this meeting is to discuss the preferred plan concept and catalytic opportunity sites developed in Task 5.2, seeking the group’s feedback and direction in potential revisions and/or refinements.

#### **Task 5 Key Deliverables**

- Board of Supervisors & Planning Commission Check-In Prep and Materials
- Refined Land Use Plan/Strategy Diagram for Soquel Dr. Corridor
- Steering Committee Meeting #5 Summary

## **Phase III: Development of Standards, Guidelines and Regulations**

### **Task 6: Financial Tools and Strategies**

Implementation of the Sustainable Community and Transit Corridors Plan in general, and the Soquel Drive Corridor Focus Area Plan in particular, will require a financing strategy that identifies the expected sources and uses of funds necessary to achieve the public improvements and policy objectives prioritized as part of the study process. As a first step in this process the consultant (or economic analysis sub-consultant) will assemble existing information on available County financial resources and programs such as fees, dedications and exactions, pending bond issues and evaluate their applicability to the Soquel Drive Corridor Focus Area specifically, and the rest of the County’s transit corridors in general. This review will be conducted in light of any specific financing constraints or requirements including affordable housing mitigation requirements, off-site development impact fees, and any limitations on revenue generated from publicly owned land. To the extent that existing mechanisms are unable to finance improvements, a variety of other financing mechanisms will be considered. These may include, but not be limited to:

- Special assessments and taxes (e.g., Mello-Roos community facilities districts, landscaping and lighting districts),
- Sale of County land/assets,
- Certificates of participation,
- Public available grants and aid, including potential State and Federal sources;
- Private contributions and donations,
- Voter approved debt or tax increases, and
- Redevelopment Agency funds (if applicable)

Given the importance of implementation, this analysis will need to be an iterative process that is integrated with other elements of the Plan. Specifically, the funding and implementation strategy will need to inform previous findings related to the optimal product mix, phasing, and the type and level of public improvements sought.

*Task 6 Key Deliverables*

- Funding and Implementation Strategies and Tools

**Task 7: Development Regulations**

**Task 7.1: Transit Supportive Mixed-Use Density and Design Guidelines and Standards**

Existing zoning regulations for various development standards like density, parking intensity, etc. will be evaluated. Recommendations will be made to revise them to ensure that the Plan maximizes the development potential of the County's transit corridors, while meeting the needs of the community and the surrounding context.

The consultant team will develop proposed standards for a transit-supportive mixed-use zoning district (or a combining zone overlay district) that could be applied to the key infill stretches and/or nodes along transit corridors in the unincorporated area identified in this study. These standards would allow for a greater flexibility in uses, and mix of uses, than current zoning allows, and also would allow for the higher densities needed to support high transit ridership levels.

Existing zoning regulations for various development standards like density, parking intensity, etc. will be evaluated. Recommendations will be made to revise them to ensure that the Plan maximizes the development potential of the County's transit corridors, while meeting the needs of the community and the surrounding context.

The standards will also incorporate special design guidelines to ensure high quality, aesthetic urban design in these key infill sites. These guidelines will build on the historic roots of portions of the Soquel Drive Corridor Focus Area (e.g., Soquel Village, Aptos Village) and possibly other transit corridor segments in the unincorporated area, while improving these areas and encouraging high quality urban design in future development. The guidelines and standards will address issues of overall image and identity (including historic character), preferred land use and its public-private domain, traffic, and circulation. The architectural character of future buildings, including massing, height character, siting (and preferred setbacks) and relationship to the street will also be studied. In addition, streetscape standards involving street furniture (like street lights, garbage bins, benches, bollards, etc.), nature of sidewalks, landscaping (like planting, water features, etc.) and signage will also be identified. All zoning ordinance and/or General Plan changes needed to implement the proposed design guidelines will be identified and addressed with County Code and General Plan amendment language proposed.

The development standards and design guidelines may incorporate a "hybrid" form-based approach that combines new form, image, and character-based design standards with traditional design guidelines and development standards. Form-based design guidelines and standards differ from conventional planning tools in several ways. First, a form-based code graphically conveys allowable building types and volumes, rather than utilizing an FAR or density standard. Form-based codes also specify allowed uses with associated performance standards, creating greater certainty for the community, planning staff, and prospective developers/tenants. In all, the potential hybrid form-based implementation portion of the Sustainable Community and Transit Corridors Plan would aim to define and illustrate (through

sections, plans, elevations, and axonometric drawings) the overall character and form that will guide development standards for both the public and private realm.

Private realm form and character-based development standards include scale and configuration of footprints, heights, massing, density, and size of individual buildings as well as configurations of new and redefined proposed blocks and lots, grouping of buildings, and layout of open spaces. Individual elements of buildings such as entrances, windows, awnings, rooftops, silhouettes, porches, and balconies will also be developed. Special attention will be paid to the interchange between public and private realm (front yards, show-windows, exterior building edge permeability) to ensure the success of a pedestrian-friendly, safe, joyful, and enriching public environment. As with overall design concepts, the “form+character” based guidelines and standards will reflect the values and context of the community and the Sustainable Community and Transit Corridors Plan project area.

The public realm consists of various types of open spaces like parks (community, neighborhood, pocket/mini, etc.), plazas (transit, community, pocket, etc.), nodes, streets, alleys, mews and other mid-block connections. The key standards of each open space typology will be defined to ensure that they are not only functional, but also contribute to the character of the transit corridor areas. Standards for various circulation and infrastructure elements such as streetlights, onstreet parking, etc., will also be developed.

#### Task 7.2: Parking Policies and Implementation Strategy

The consultant team will make recommendations to optimize parking operations in the plan area. Potential parking management strategies include metered parking with variable pricing structures, shuttles to remote lots, and neighborhood permit parking programs. The consultant team will develop parking requirements and broad guidelines for the Soquel Drive Corridor Focus Area. Consultant will also propose new transit corridor parking standards for inclusion in the County Code and compare them to industry-standard parking rates from the Urban Land Institute, Institute of Transportation Engineers, and other available sources. Based on this review, consultant team will recommend parking rates, or ranges of rates, for land uses within the Soquel Drive Corridor Focus Area, including provisions for mixed-use sites, as well as policies addressing tandem parking, neighborhood parking programs, and metered parking zones.

#### Task 7.3: Steering Committee Meeting #6

The purpose of this meeting is to discuss and review the Plan’s draft design guidelines and standards, seeking the group’s feedback and direction in potential revisions and/or refinements.

#### Task 7.4: Developer Roundtable #2

The consultant team will conduct a second roundtable with developers, brokers and real estate professionals to review and comment on the development standards, guidelines and regulations.

#### Task 7 Key Deliverables

- Development Standards and Design Guidelines
- Street, Landscaping and Public Space Standards
- Architectural and Signage Standards and Guidelines
- Parking Policies and Implementation Strategy
- Developer Roundtable #2
- Steering Committee Meeting #6 Summary

## **Phase IV: Draft and Final Plan**

### **Task 8: Final Plan Development**

#### **Task 8.1: Community Workshop #3: Preliminary Draft Plan Components**

The consultant team will design, facilitate and graphically record a third community workshop to review and discuss the preliminary Draft Plan components.

#### **Task 8.2: Administrative Draft Plan**

Consultant will prepare the Administrative Draft Plan that will, with clear and comprehensive narrative and graphics, present the Draft Plan elements and encompass all components required by State law. This will include a description of the future vision for the area; an existing conditions analysis; key assets and challenges; overall development and revitalization framework and urban design concepts for the area; a unified set of urban design guideline recommendations; appropriate infrastructure and circulation improvements; supporting improvement strategies, phasing and prioritization of improvements; and a series of funding options and a general financing strategy to implement the improvement efforts. The consultant team will work collaboratively with staff on two rounds of revisions. Staff will provide one set of consolidated edits with each round.

#### **Task 8.3: Steering Committee Meeting #7**

The purpose of this meeting is to discuss and review the Administrative Draft Plan, seeking the group's feedback and direction in potential revisions and/or refinements.

#### **Task 8.4: Public Review Draft Plan**

The consultant team will incorporate edits to the Administrative Draft Plan to create the Public Review Draft Plan. Refinements will be made to content, layout and graphics per the instruction of County staff and consultant team input.

#### **Task 8.5: City Council/Planning Commission Hearings (2)**

The consultant team will attend one Planning Commission hearing and one Board of Supervisors hearing to present the Final Draft Sustainable Community and Transit Corridors Plan for acceptance/adoption.

#### **Task 8.6: Final Plan Development**

Consultant will review with County staff the comments and recommendations heard at the Board and Commission hearings. Staff will provide one consolidated list of comments in electronic format to the consultant to integrate in the Sustainable Community and Transit Corridors Plan. Consultant will revise and prepare the Final Plan document.

#### **Task 8 - Key Deliverables**

- Community Workshop #3 Prep, Materials, Facilitation, Recording
- Administrative Draft Plan
- Public Review Draft Plan
- Council/Commission Hearings (1 each)
- Final Plan
- Steering Committee Meeting #7 Summary



### **Task 9: Ongoing Project Management**

The consultant team will conduct calls and meet with County staff, as needed, at key stages of the project to review key ideas, products and deliverables, the project status, and overall project direction and budget. All products will be reviewed by staff before presentation at the community workshops. Staff meetings (face-to-face and/or conference calls) with the Consultant Project Management Team will provide opportunities for staff to review various project deliverables including community workshop agendas, workshop summaries, proposed urban design concepts and alternatives, preferred alternative, draft plan, and final plan documents.

Consultant will manage all aspects of the project to maintain project schedule and budget, maintain continuous liaison with the County and other interested parties, and provide continuing consultation and advice to the County on all matters relating to the project. Consultant will prepare and submit monthly progress status updates to the County. The reports will include progress of work; status of public involvement; updated project schedule; information/decisions required to maintain schedule and complete deliverables; problems encountered that may affect schedule, budget or work products; and anticipated work products for the following month.

#### **Task 9 Key Deliverables**

- Regular Staff Meetings and Calls
- Monthly Project Management Status Updates